SessionWorks Judge Edition

User Guide – Release 2.0

SessionWorks Judge Edition

Signing On

Your sign on credentials open SessionWorks Judge Edition to your **Home** page. On your **Home** page are calendars that show, by month and day, the Odyssey court sessions scheduled for you.

Figure 1 – Odyssey SessionWorks Judge Edition Sign-On Screen

Guests see what the judge pushes to them to view, which are documents and some of the case details. Attorneys are always in guest mode.

Calendars and Scheduled Sessions

This chapter guides you through the activities of working without paper and file folders. You can view essential case information, access and bookmark vital documents, and enter and attach notes. Also, you can conveniently work with multiple defendants or cases simultaneously. The **Home** page was created to resemble your bench desktop. At your personal workspace, navigate and manage session and case information efficiently and securely.

Home Page

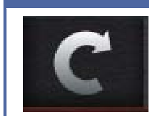
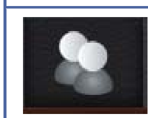
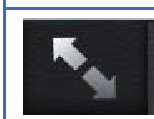
The **Action List** remains blank until you review cases and place them in the **Ready** folder. You work with folders in the “Session Manager” chapter.

Figure 2 – Home – Action List

Home Page Buttons

The buttons on your **Home** page enable you to perform specific functions.

Table 3 – Home Page Buttons

Buttons	Description
	Refreshes the calendars with information uploaded from Odyssey Case Manager.
	Opens the **Group Navigation** dialog box. For instructions, refer to the “Group Navigation” section.
	Maximizes and minimizes the current screen.

Buttons	Description
	Initiates the closing of the SessionWorks Judge Edition application.
	Populates with read-only, quick-reference information from the items already addressed and moved to the **Ready** folder.
	Displays the monthly and daily calendars for the current user.
	Opens the **Configuration Page**. For information and instructions, refer to the "Judge Edition Configuration" chapter.

Group Navigation

Group Navigation mode supports one user as the director, while all other users are followers. Only one user at a time can be the director, who opens and works on exactly what the followers see on their screens. Private notes to any user are not visible to other users.

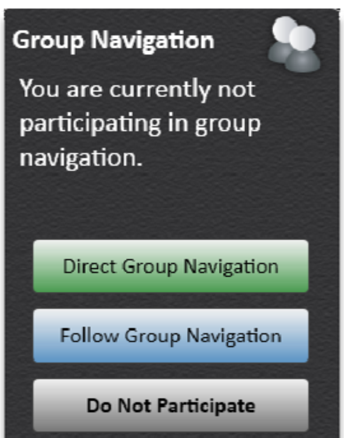


Figure 3 – Group Navigation Control

To use **Group Navigation**, tap the appropriate option for the action you want.

Monthly and Daily Calendars

On your desktop, in **Day View**, the monthly and daily calendars show your scheduled sessions. From a calendar you open a session.

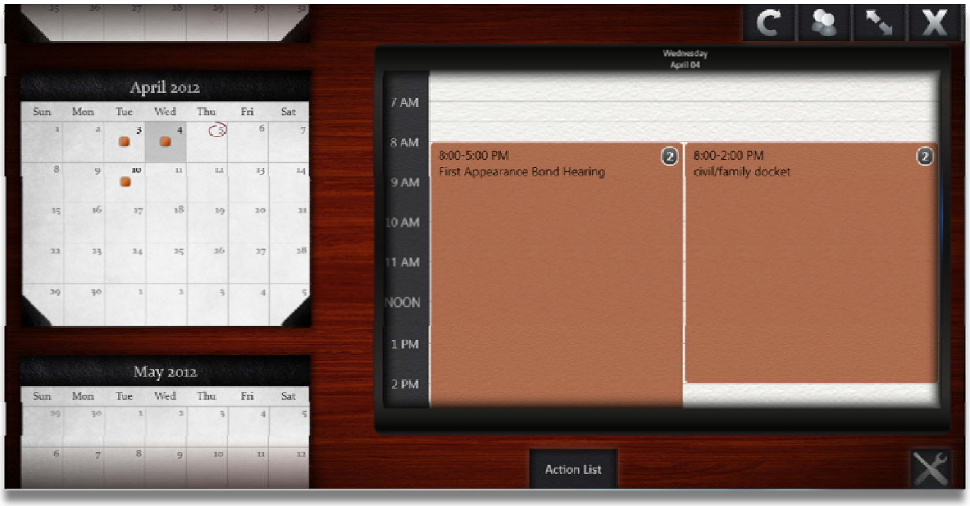
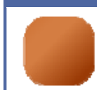


Figure 4 – Home – Day View

For a case to display on your calendar, it must originate from a hearing set up in Odyssey Case Manager.

Table 4 – Month Calendar Indicator Descriptions

Indicator	Description
	Indicates sessions scheduled for the day.
	Identifies current day.
	Highlights selected day.
Action List	Populates with read-only, quick reference information from the items placed in the **Ready** folder, after tapping **Start Court** (explained on the **Case Nav** pane).
Day View	Displays the monthly and daily calendars for the current user.

To scroll to a desired month and select a day:

1. Scroll calendar months to desired month by flicking a fingertip over the calendar area or hover over the blue line on the edge of the page with the mouse to display the bar.
2. Select a day by tapping its calendar square.

   This opens the court session calendar for the day.

3. Scroll through the sessions scheduled for the day by flicking a fingertip over the day calendar.

   The horizontal red line indicates the current time.

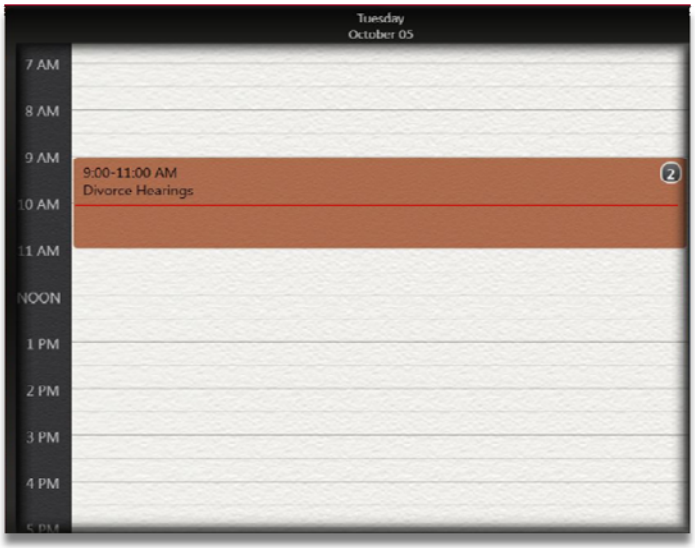
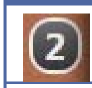


Figure 5 – Home – Day View

These indicators appear on your daily calendars.

Table 5 – Day Calendar Indicator Descriptions

Indicator	Description
	Indicates the number of cases scheduled for a specific session.
	Marks the current time with a red line.

Opening a Session

On the open day, tap a session to open it.

Session Manager opens with the cases scheduled for that selected session.

Cases and Folders

The session that you select opens in **Session Manager** showing an entry for each case scheduled for that session. Folders represent the file folders on your desk. In **Session Manager**, folders are the holding areas where you place cases as you work with them. Initially, scheduled cases are in the **Not Processed** folder. Based on the order and details surrounding how you plan to hear each case, place each case into the appropriate folder to reflect your workflow.

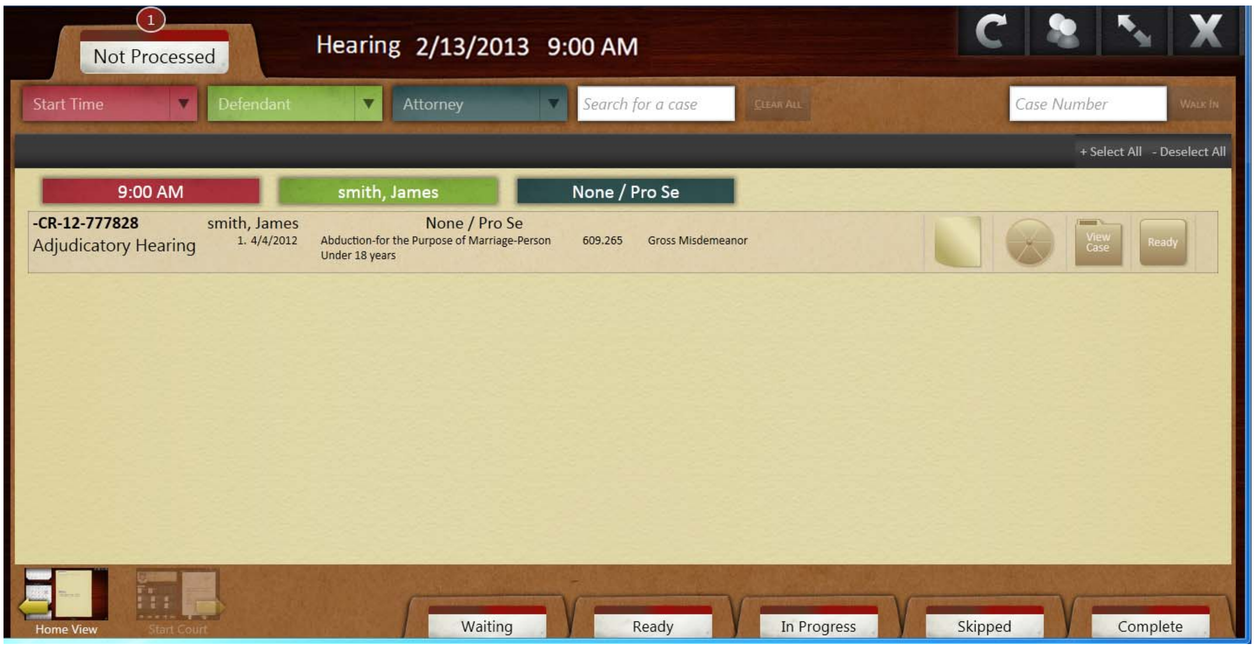


Figure 6 – Session Manager

Case Flags

Case flags are viewable from Judge Edition **Session Manager** and **Case** view. Case flags give additional information about a case. Multiple case flags will be listed and case flag comments can be viewed from the Judge Edition ROA.

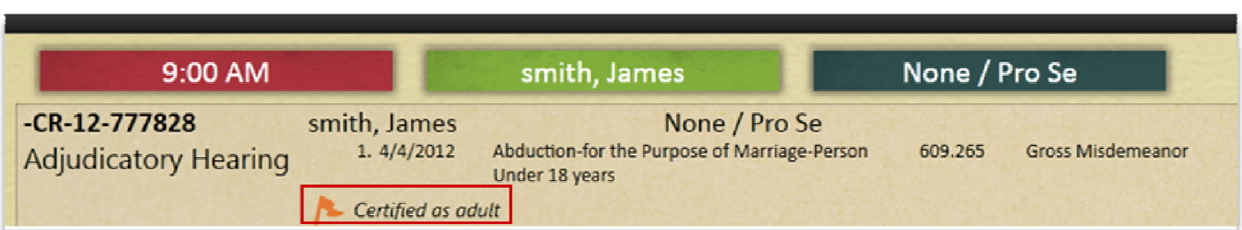


Figure 7 – Case Flags

Session Manager Folders

Each folder has a red circle with the number of cases currently in that folder.

Table 6 – Session Manager Court Folders

Folder	Description
Not Processed	Contains scheduled cases downloaded from Odyssey.
Ready	Contains cases ready to be heard according to the order in which you placed the case into this folder. Tap **Start Court** to open the first case in folder.
Waiting, In Progress, Skipped	Holds cases meaningful to you for the current court session.
Complete	Contains cases directed by the **Mark Complete** button on the **Case Nav** pane.

Placing Cases into Folders

To open a folder, tap its tab. When a folder is open, its tab is in the top left corner of the desktop.

Figure 8 – Session Manager Folders

1. To place cases in folders:

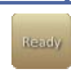
Tap **Case Control**  to open its **Action**  menu.

2. Tap Set Status.

ℹ *Note: Placing a case into a folder does not change the status of the case in Odyssey.*

3. Tap the name (tab) of the destination folder.

Placing a Case Directly into the Ready Folder

In **Session Manager**, each case entry has a  button.

To move a case directly into the **Ready** folder, tap .

Grouping and Ungrouping Cases in a Paper Clip

When cases upload from Odyssey to Judge Edition, related cases are automatically fastened together with a paper clip when these conditions exist:

- Multiple criminal cases for the same defendant in the same session
- Non-criminal cases with multiple hearings in the same session

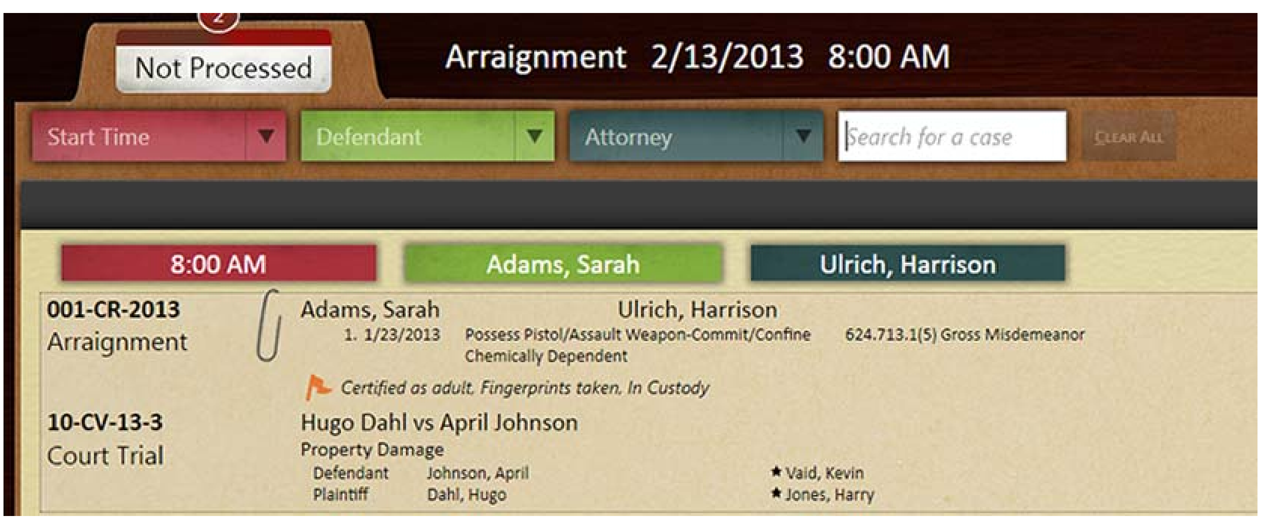


Figure 9 – Cases Fastened with a Paper Clip

To group several cases together with a paper clip:

1. On the **Session Manager** page, tap each individual case to select it.

   Each case selected is highlighted.

2. On one of the selected cases, tap  to open .
3. Tap **Paperclip**.

To ungroup documents from a paper clip:

1. Tap the group fastened together with a paper clip.

   The group is highlighted.

2. On one of the cases, tap  to open .
3. Tap **Unpaperclip**.

Searching for a Case

SessionWorks Judge Edition provides several methods for quickly retrieving cases.

Using Start Time, Attorney, and/or Defendant to Retrieve Matching Cases

The fields immediately under the open folder tab give access to drop-down lists from which you set the criteria to search and list in **Session Manager**. Select an entry from one or all of these fields.

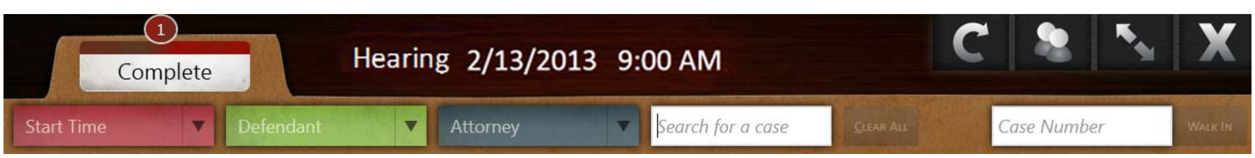


Figure 10 – Search Criteria Fields

To search for cases using the search criteria fields:

1. Tap the triangle on a search field to open its drop-down list.
2. Select the appropriate entry.

   Each selected entry refreshes the search criteria and adjusts the cases list accordingly on **Session Manager**.

Using Session Manager Case Details Information to Retrieve Matching Cases

The case details information listed in **Session Manager** can serve as the search criteria to retrieve cases that match that information.

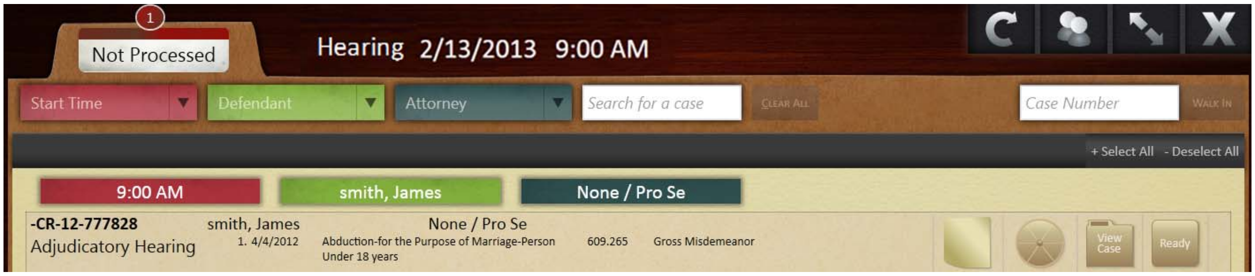


Figure 11 – Session Manager Case Details Information

To use case details information to search for cases:

1. In the ***Search*** text box (white text box), type the case detail information to match against information in cases.

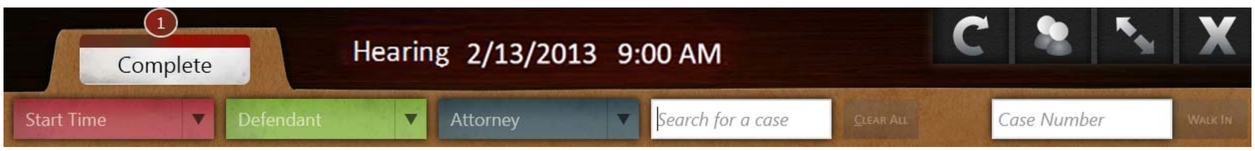


Figure 12 – Search Text Box

2. In the list of returned matches, to open an specific entry click the  (**View Case** button) on that case.

Retrieving a Walk In Case

Whenever a person wants to address a case not scheduled on the court's calendar, this case is referred to as a walk in. To work a walk in case requires retrieving its case file from the Odyssey database.

Note: Retrieving a case number does not list the case on the session within Odyssey Case Manager.

Figure 13 – *WALK IN* Search Field

To retrieve the Odyssey case file for a *WALK IN* case:

1. In the ***WALK*** *IN* field provide the Odyssey case number of the file, either by:
   - Typing the case number, or
   - Position the cursor in the ***WALK*** *IN* field and scan the barcode on the outside of the physical case file.
2. Tap ***WALK IN***.

   Matching on a partial case number, such as 01389, retrieves all cases that match the entered characters as you type. A dialog box opens with the match results for you to select the case.

Typing a Sticky Note on the Outside of a Case File

In **Session Manager**, the note sheet  is the electronic version of the paper sticky note placed on the outside of a case folder. A sticky note is only relevant to the current hearing; therefore, it does not persist to future hearings. Linking several cases with sticky notes in a paper clip results with all but one sticky note deleted.

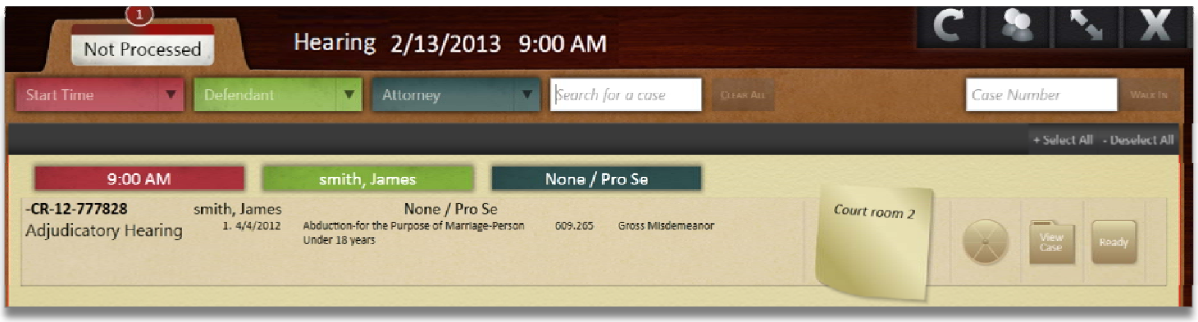


Figure 14 – Session Manager, Case Sticky Note Sheet

To add a sticky note:

1. Tap  to open the note sheet.
2. Type your text.

   When finished typing, just move the cursor out of the sheet and continue on with your work.

Viewing a Case File

To open a case from the **Action** menu:

1. In **Session Manager**, click  to open the  **Action** menu.
2. Click **View Case** to open the selected case.

Figure 15 – Case View

Case Nav Pane

In **Case View**, the **Case Nav** pane provides buttons for toggling between TOC and Notes.

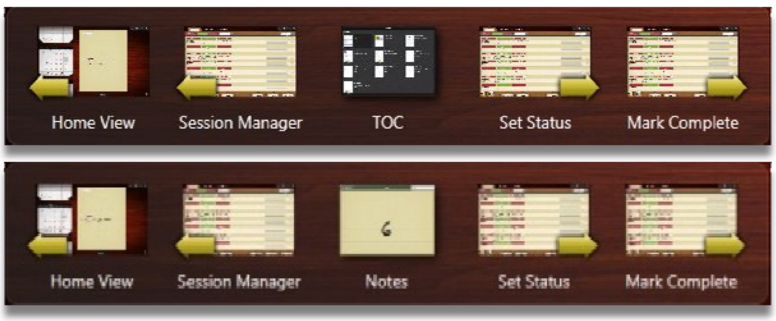


Figure 16 – Case Nav Pane Buttons

The following options are available in the **Case Nav** pane.

Table 7 – Case Nav Pane Buttons Descriptions

Button	Description
Home View	Closes **Case View** and opens the **Home View** where your calendars reside.
Session Manager	Opens **Session Manager**.
TOC or Notes	Opens the **Table of Contents**, which includes the **Favorites** pane. Opens the list of notes when notes exist.
Set Status	Opens the dialog box so you can place the current case into a work folder, add a note, and move a case.
Mark Complete	Sends the open case to the **Complete** folder.

Case Details

The **Case Details** pane displays information belonging to the open case. Typically this includes the case type, case number, parties involved, and name of the lead attorney.

Figure 17 – Case Details Pane in Case View

Refer to the “Judge Edition Configuration” chapter or ask your administrator.

Favorites and Table of Contents

The **Favorites** pane and the **TOC** pane below it, scroll independently of each other.

You configure the most commonly referenced documents to list in the **Favorites** pane. The **TOC** contains a thumbnail of each document on the case.

Note: Some documents will appear under the favorites section by default, with no configuration required. Any document attached to the current hearing will display under favorites. Also documents attached to an event that is related to the current hearing will appear under favorites by default, this includes documents attached to a child event of an event related to the current hearing.

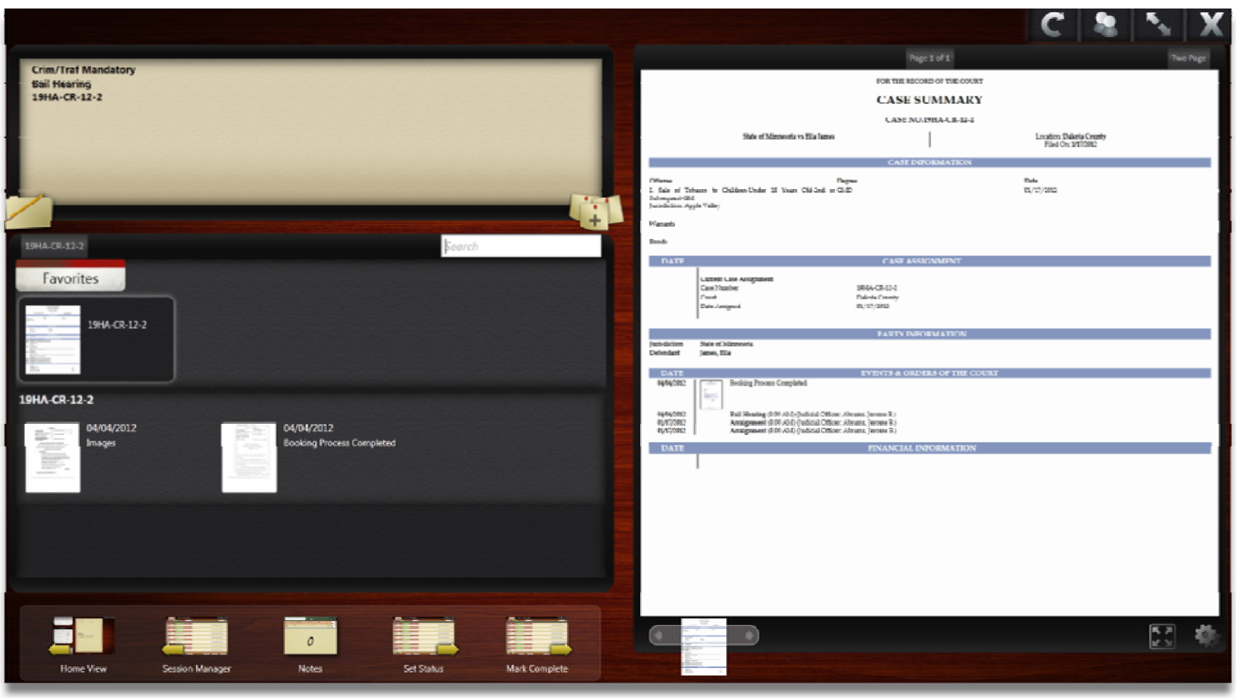


Figure 18 – Case View

To hide or show the **Favorites** pane, tap the **Favorites** label.

To review the documents attached to a case:

1. Scroll through **Favorites** or other attached documents.
2. Tap the document to open it in the **Viewer**.

Documents on a Case

You can review selected documents either one or two at a time, flag pages with bookmarks, work with notes, download PDF documents, copy text from PDF documents and print documents.

Handling Documents

To open a document:

1. Scroll through **Favorites** or other attached documents.
2. Tap a document to open it in the **Viewer**.

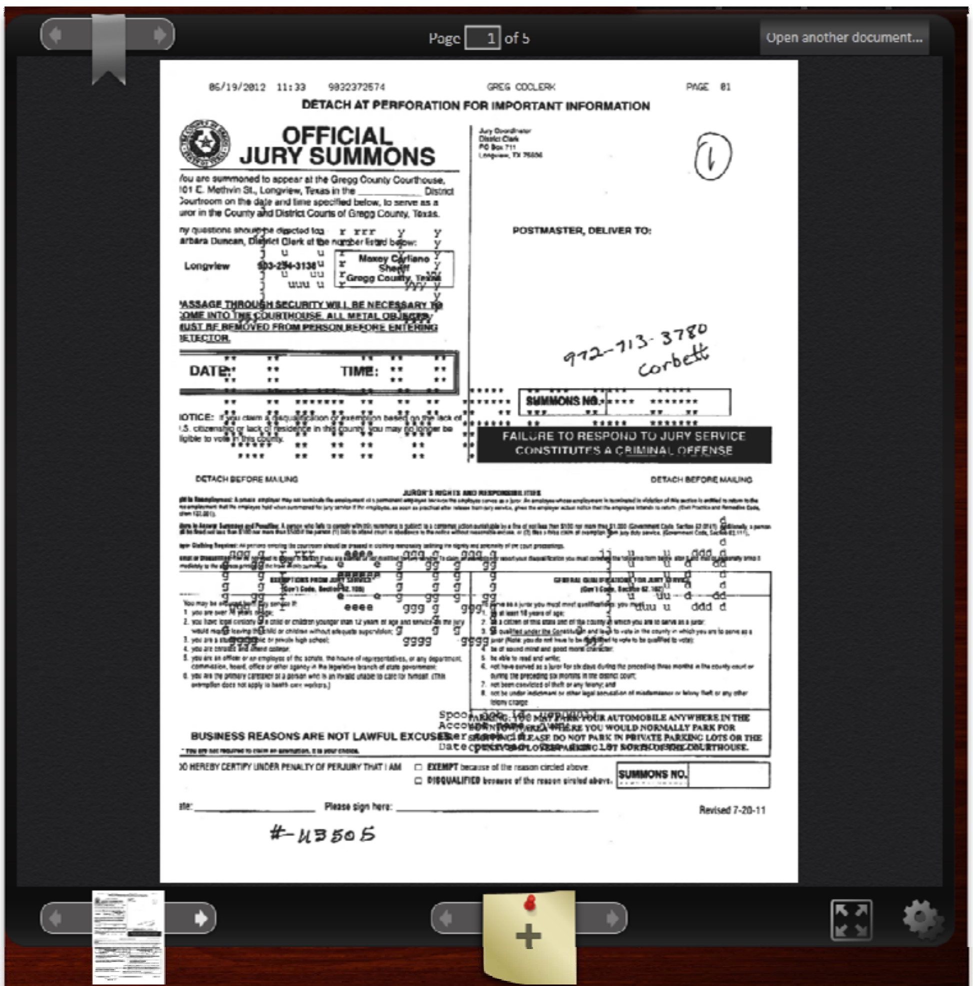


Figure 19 – Multi-page Document with Document Viewer Controls

To open a different document, go to the **TOC**; tap **TOC** if needed.

Paging

To move quickly to another page, use either of these options:

- Tap 

to open the **Go to Page** pad, and then tap the number of the page to open in the Viewer.

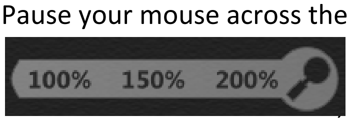
- Tap an arrow to go to next/previous page.

- Or, flick the pages to go to the next or previous page.

Zooming and Panning

To adjust the size and position of the document in the **Viewer** screen, use touch gestures, the **Zoom/Pan/Rotate** control or the **Zoom** tool. For detailed instructions on touch gestures, refer to the "Navigation Controls" chapter

To zoom and pan, use one of the methods:

- Pinch and spread  on the document.
- Tap the gear  to open the **Zoom/Pan/Rotate** control.
    - Move the slider  first to zoom, then tap the  appropriate pan arrows.
    - Use the circular arrow to rotate the open image.
- Pause your mouse across the bottom of the **Viewer** screen to display the zoom tool 

, then click the desired magnification.

Open Another Document

Two different documents can be viewed side by side. This functionality allows you to view two case documents at a time in side by side document viewers.

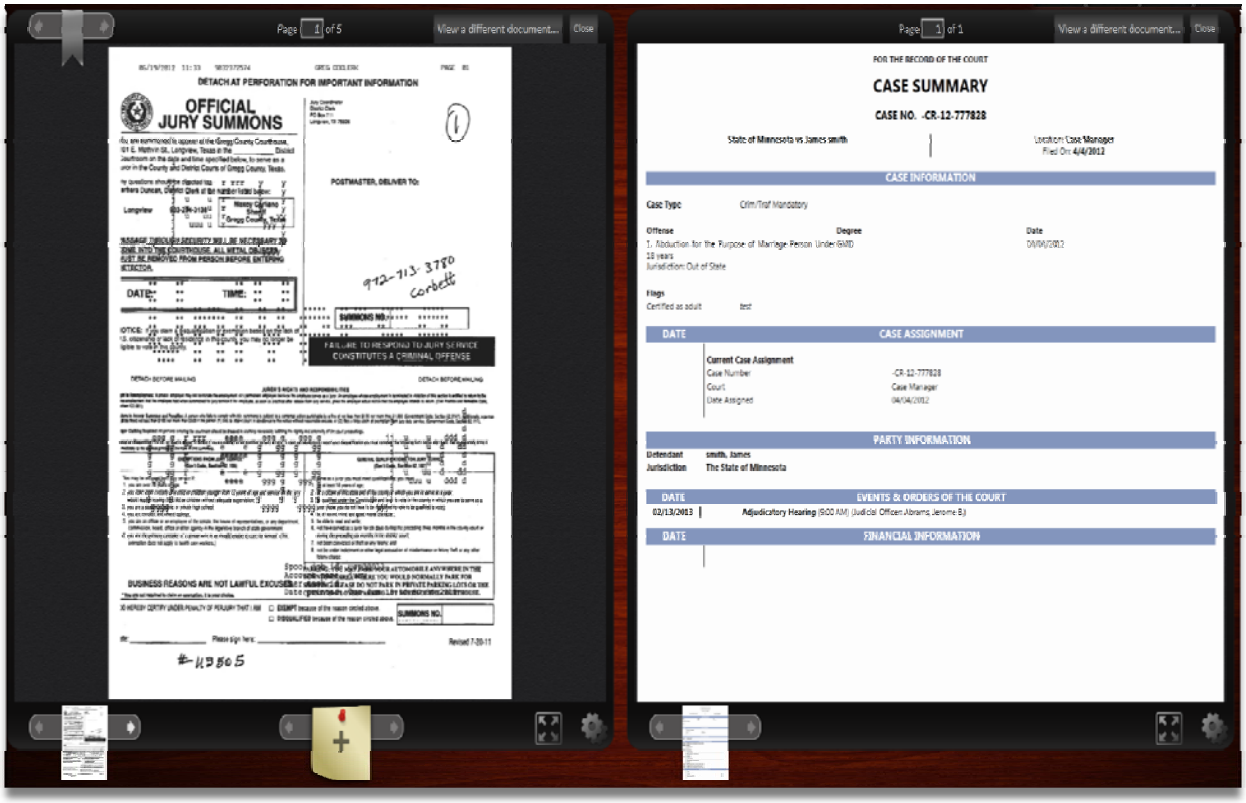


Figure 20 – Two Documents Side by Side

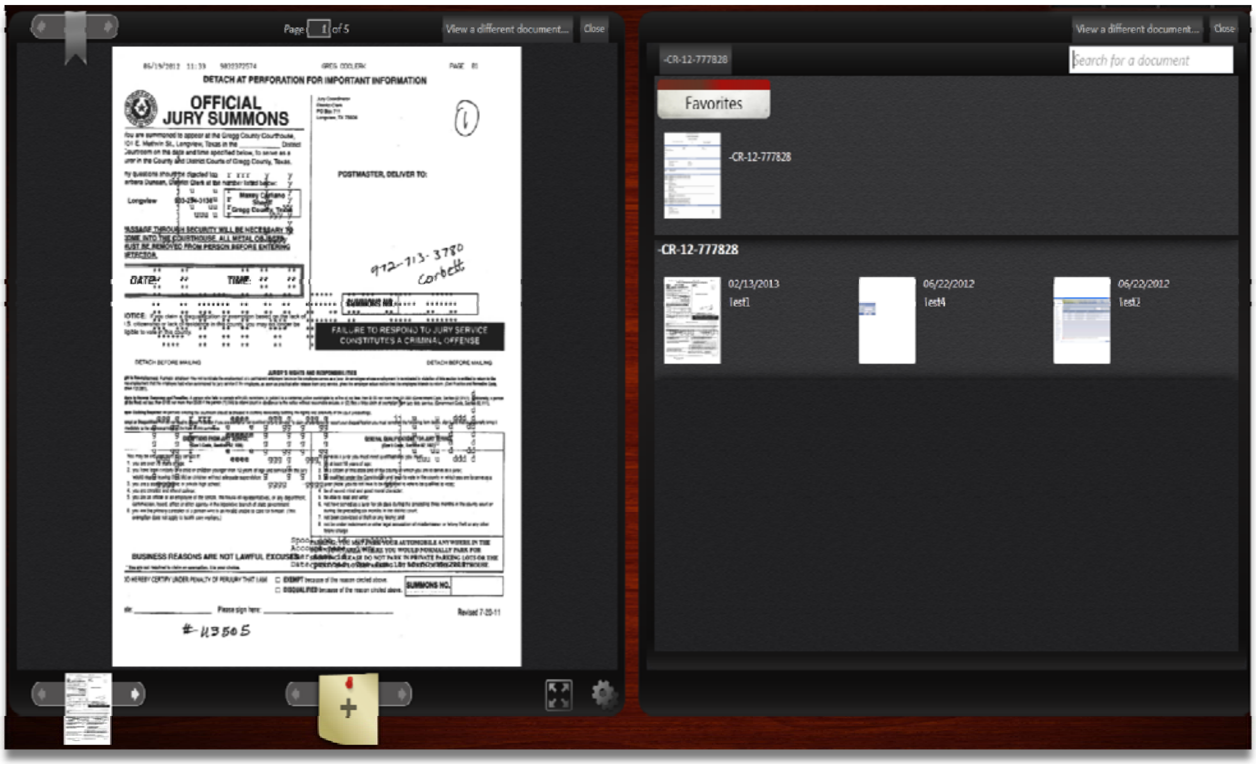


Figure 21 – Select Another Document from TOC

In **Case** view you can view two documents at a time by tapping 

at the upper right corner of the page. Then select the other document you wish to view.

To return to one document, tap **Close**.

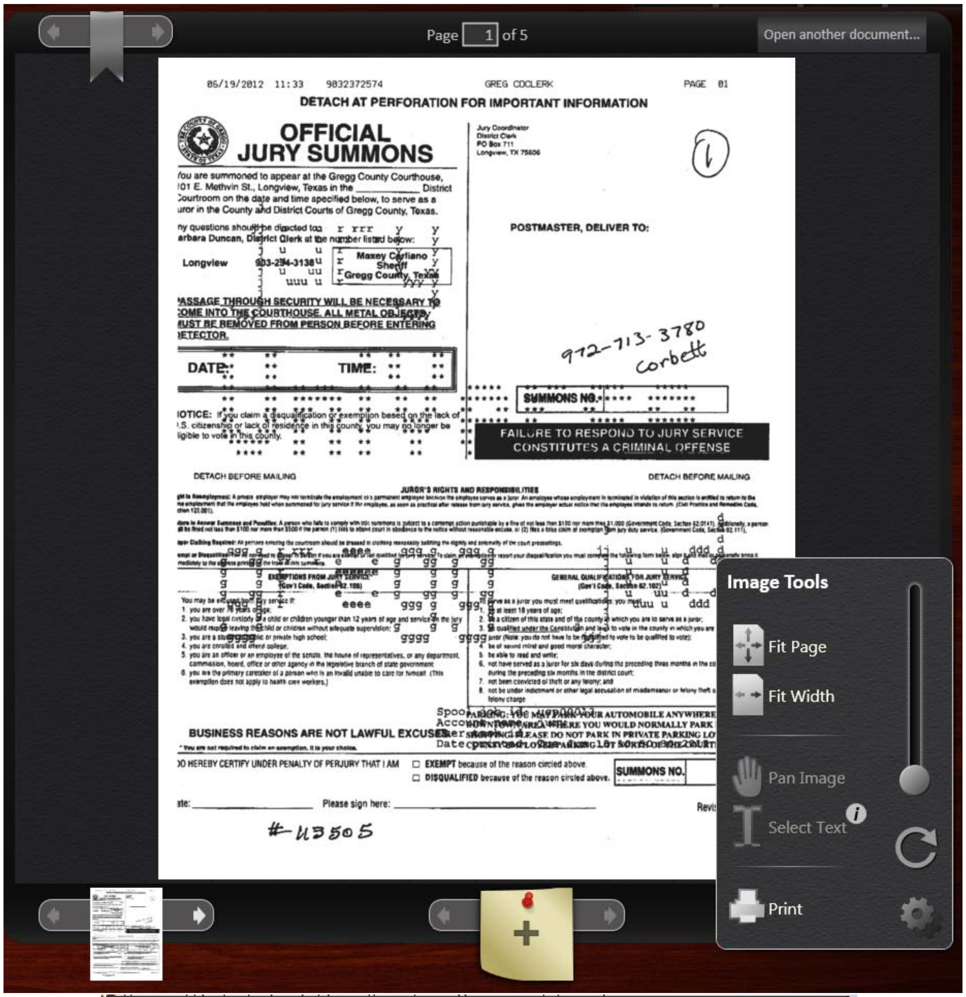
Download Documents

Users have the ability to download and view a PDF document. Other supported file types include TIFF, JPEG, and PNG. Documents are automatically downloaded during the overnight process.

Note: In previous versions of Judge Edition TIFF files, which are scanned pieces of paper were viewable. With the advent of eFiling, clerks now receive PDF documents electronically. Judge Edition now displays both TIFF and PDF file types. The document viewer does not callout one file type over another.

Print Documents

You have the ability to print a document. When viewing a document, tap the gear  in the lower right corner of the page. Use the **Image Tools** menu to select and print the currently viewed document. The print options dialog box will appear once selected.



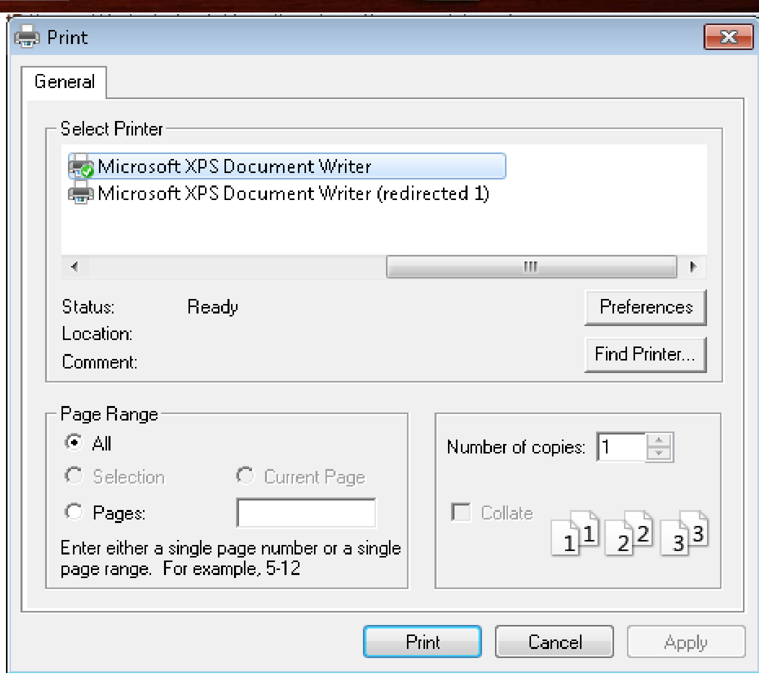


Figure 22 – Print Document

Copy Text From a Document

An option to copy text from a PDF document is available from the **Image Tools** menu. If the document was originally added as a PDF in Odyssey with embedded text, the text can be copy/pasted from the document using the **Image Tools** menu.

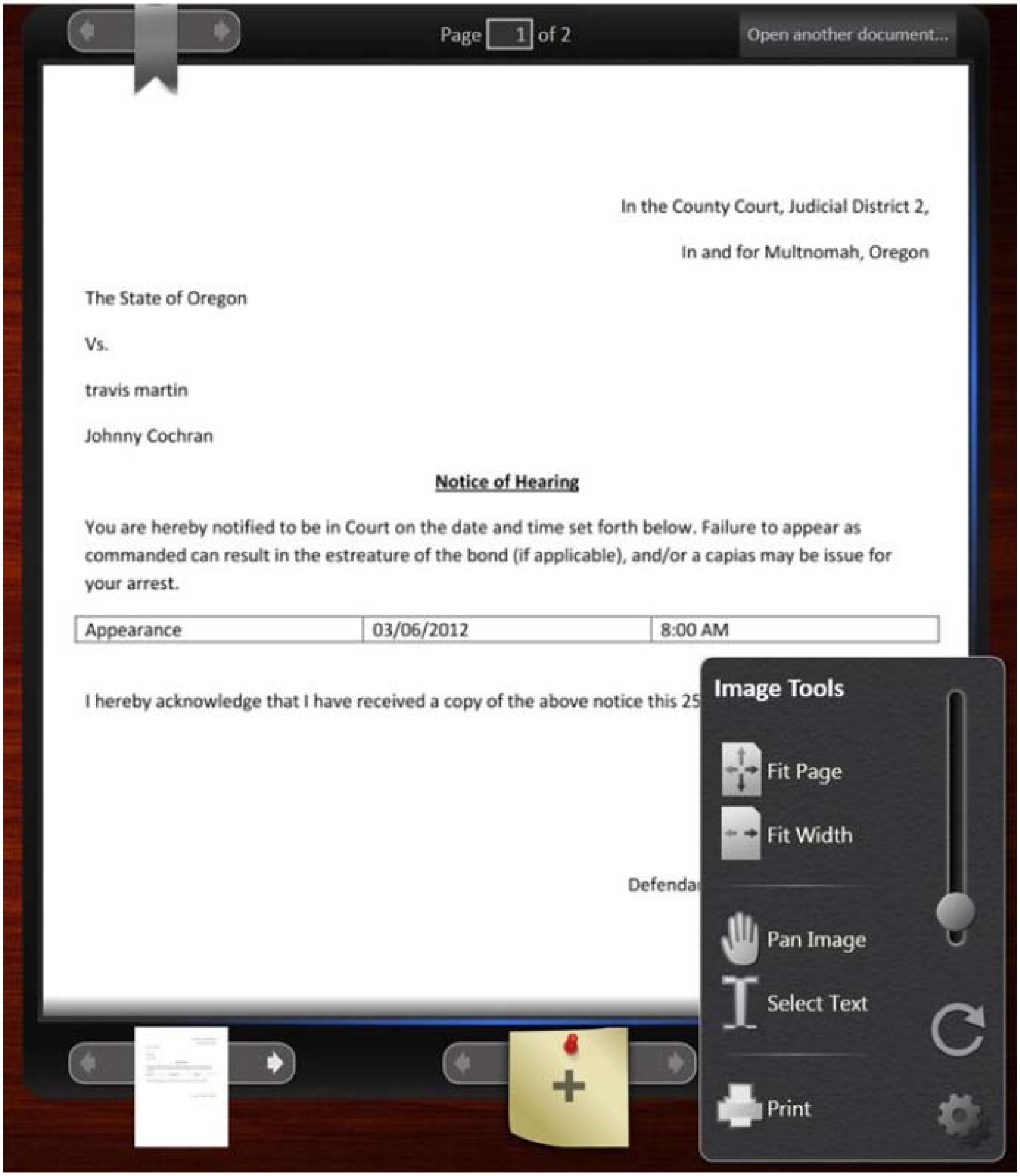


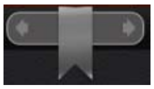
Figure 23 – PDF with Image Tools Menu

Bookmark Pages of Interest

Bookmarks are for marking pages of interest. At any time you can scroll quickly forward and backward from bookmark to bookmark.

Inserting a Bookmark

To insert a bookmark:

1. Scroll to a page on which you want to apply a bookmark.
2. Tap  to open the bookmarks bar.
3. Tap the bookmark color that you want to insert.

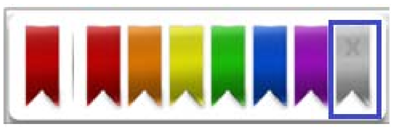


Figure 24 – Bookmarks

Scrolling to a Bookmarked Page

Scrolling moves to the next bookmark in the direction of the arrow  tapped.

Removing a Bookmark

To remove a bookmark:

1. Scroll to the appropriate bookmarked page.
2. Tap  to open the bookmarks bar.
3. Tap  to remove the bookmark.

Notes

SessionWorks Judge Edition enables its user to attach notes to a whole case or to a specific page and location on a page within a document on a case. In addition to serving as information holders, notes have note types that trigger a call for action or restrict viewing to just the author. An easy-to-access list of notes provides a quick summary view of the case and page notes on an open case.

About Note Types

The note types are available on both case notes and page notes. The note types are:

- **Note** is viewable by all Judge Edition users, except attorneys.
- **Important** note serves as a call for action.

  When a case opens, the note list opens with unacknowledged (red) important notes at the top of the list.
- **Private** note belongs to the original author. Viewing, editing, deleting is only done by this user.

Case Notes

You add notes on an open case in **Case View**.

Adding a Case Note

The **Add Case Note** icon  is on the **Case Details** pane.

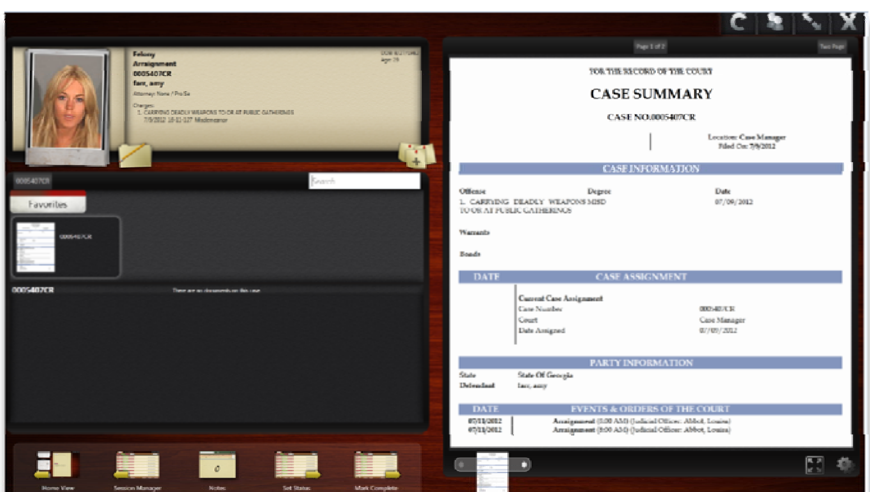


Figure 25 – Case Details Pane on an Open Case

To add a note to an open case:

1. On the **Case Details** pane, tap  to open the notepad.

Figure 26 – Case Notepad

2. Type note text.

3. If appropriate, set a note type (important, private).

4. Tap **Save Note**.

Assigning a Note to Cases in a Paper Clip

Adding a note to a case linked with other cases in a paper clip attaches this note to all of the cases in the paper clip. Only one note, and only one version of that note, can attach to the notes in a paper clip. Any edits made to the note applies to all cases in the group.

To add a note to *only* one of the paper-clipped cases:

1. On the notepad, click the **Cases** button to open the **Choose Case(s)** dialog box.

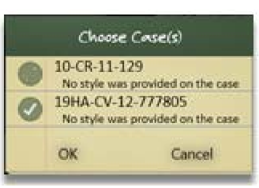


Figure 27 – Case Notepad Listing Cases in a Paper Clip

2. On the **Choose Case(s)** dialog box, tap the circle of each case to attach to the note.

   Tapping a circle sets a check mark on the selected case.

3. Tap **OK**.

To unlink a case from a note:

1. On the notepad, click the **Cases** button to open the **Choose Case(s)** dialog box.
2. Clear the check mark from case that you want to remove from the note.
3. Tap **OK**.

Working Notes from the Note List

The **Notes** button displays the total number of note entries on the current case.

Opening Existing Case Notes and Page Notes

To open the list of the notes on an open case:

1. Tap the **Notes** on the **Case Nav** pane.

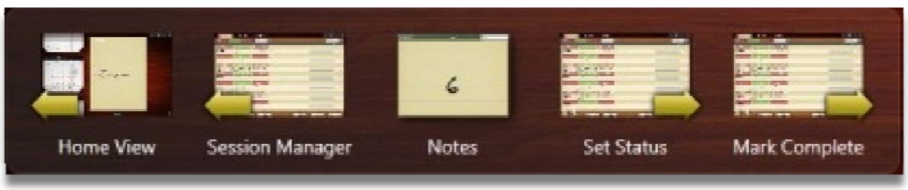


Figure 28 – Case Nav Pane

The list of the notes opens. A page note entry includes a document icon that you can tap to open that note on the document page.

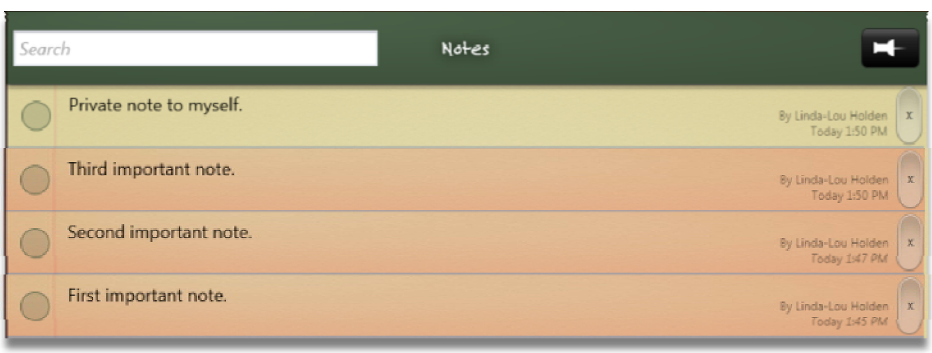


Figure 29 – List of Case Notes on an Open Case

Each note entry has audit information of author name, date, and timestamp.

2. On the note list, tap a note entry to open it
3. Work the note as needed – edit, change to private, or delete (if original owner).

Searching for a Note

A search looks at the currently open case or the cases linked with a paper clip.

To find a specific note:

1. In the **Search** text box, type the text you wish to find.

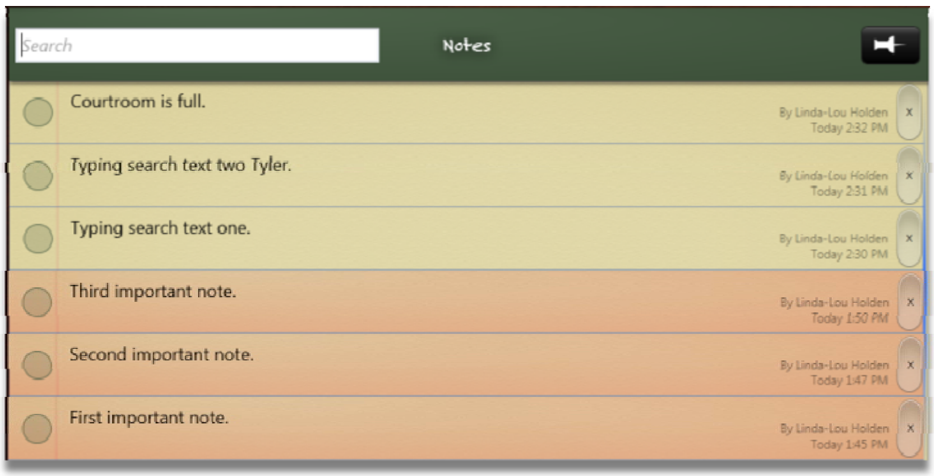


Figure 30 – Search Text Box on the Note List

The result is a filtered list of the notes that have a text match.

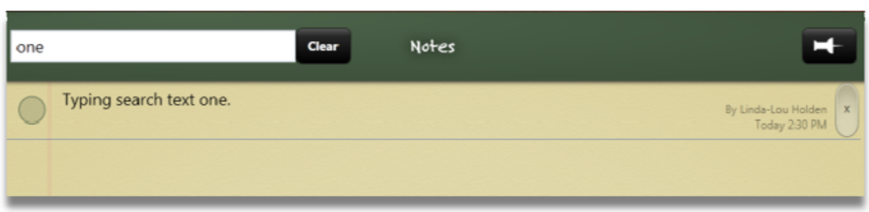


Figure 31 – Note List Refreshed with the Results of the Search

2. Tap **Clear** to return to the note list.

Acknowledging a Note

An important note can be acknowledged when read. Any user can acknowledge or unacknowledged a note; you do not have to be the initial author. The note list opens with the important notes in red at the top of the list.

To acknowledge (as read) an important note, tap the circle at the left of an entry on the note list.

This action inserts a check mark within the circle. An acknowledged, important note changes background color and no longer appears at the top of the note list when the associated case opens.

Deleting a Case Note

Only the originating author can delete a note. Reference the audit information for the name of the author and request the author delete the note. Once deleted, a note is gone forever. There is no way to get it back.

To delete a note, the author does the following from the note list:

1. Tap the white oval X button to display the red **Delete** button.

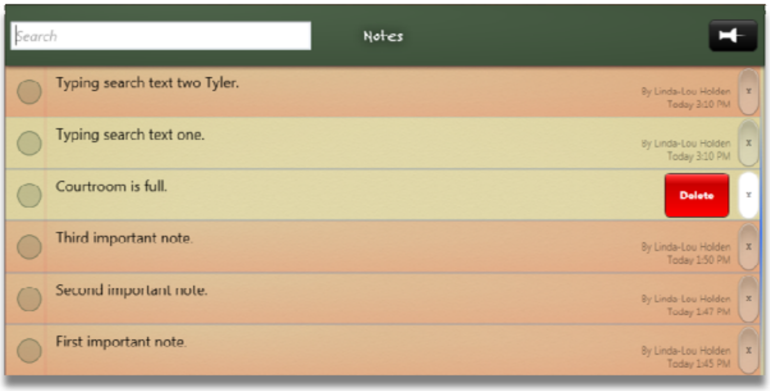


Figure 32 – Deleting a Note

Note: To cancel the delete operation before you tap Delete, tap the oval X button again.

2. Tap the **Delete** button.

   The deleted entry is no longer in the note list.

Undocking, Moving, Resizing, and Docking the Note List

To undock the note list, move it, resize it, and redock it:

1. Tap the white tack at the top of note list to undock.
2. Drag the note list to where you want it.
3. Touch the lower-right corner and drag the resize arrows to resize the note list.
4. Tap the blue oval X on the note list to redock.

Leaving Notes

To leave notes and select another activity, tap the appropriate button in the **Case Nav** pane.

Figure 33 – Case Nav Pane

Page Notes

You add a page note to an open page. The  page note marker flags the area to which its note applies. You can drag this note to any location on the page.

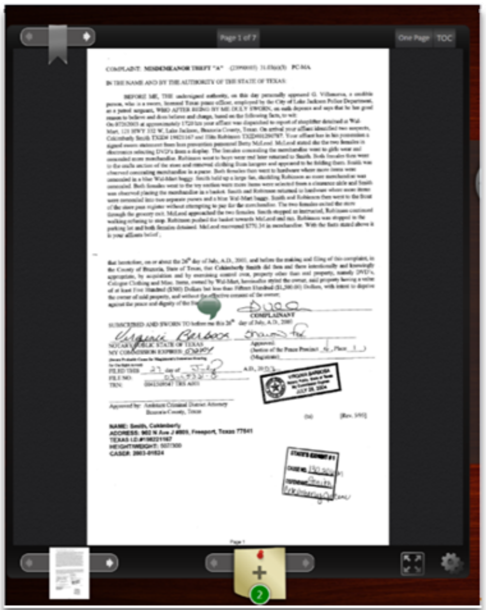


Figure 34 – Document with Page Note Button

Adding a Page Note

To add a note for a one-page document or the page open in the **Viewer**:

1. On an open document, move page-to-page  to a specific page.
2. Tap  to open the notepad.

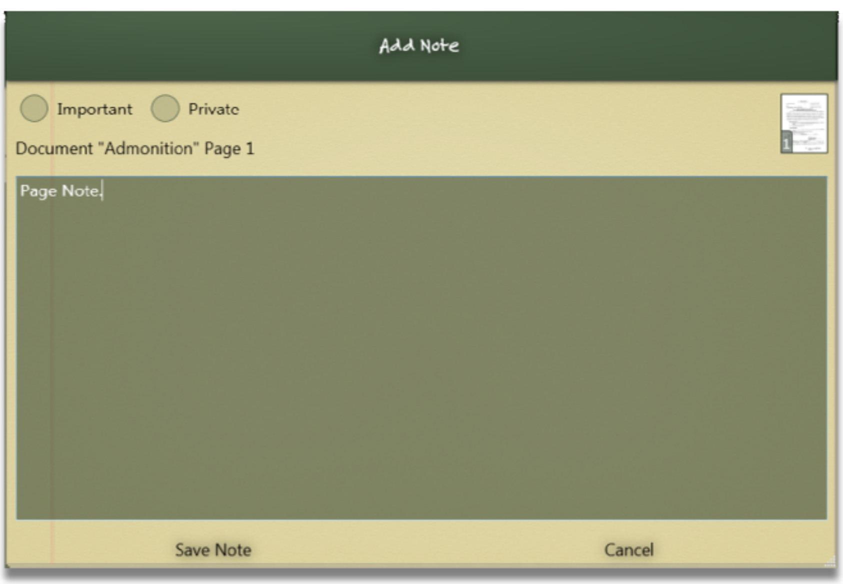


Figure 35 – Page Notepad

3. Type the note text.

4. If appropriate, set a note type (important, private).

5. Tap **Save Note**.

Opening a Page Note and Moving the Marker

The marker flags the area to which its note applies.

To use the marker:

1. Drag to the desired location on the page.

2. Tap a marker to display the note text.

Editing a Page Note

To edit a note:

1. Tap a page note marker.

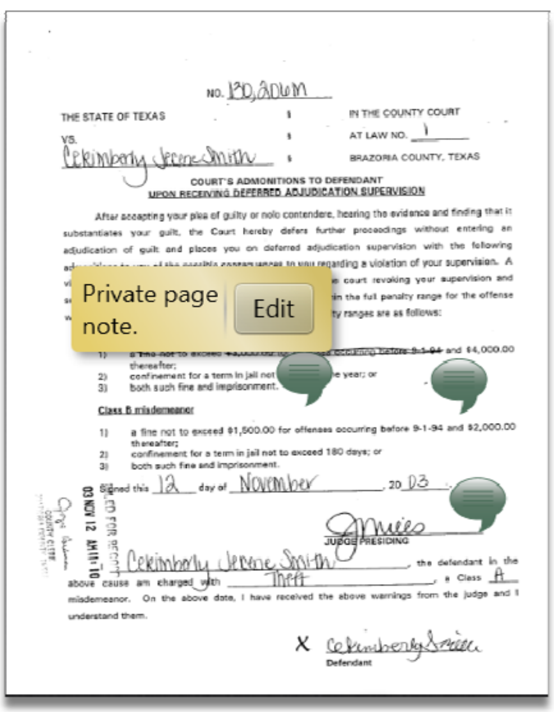


Figure 36 – Marker Tapped to Edit Note

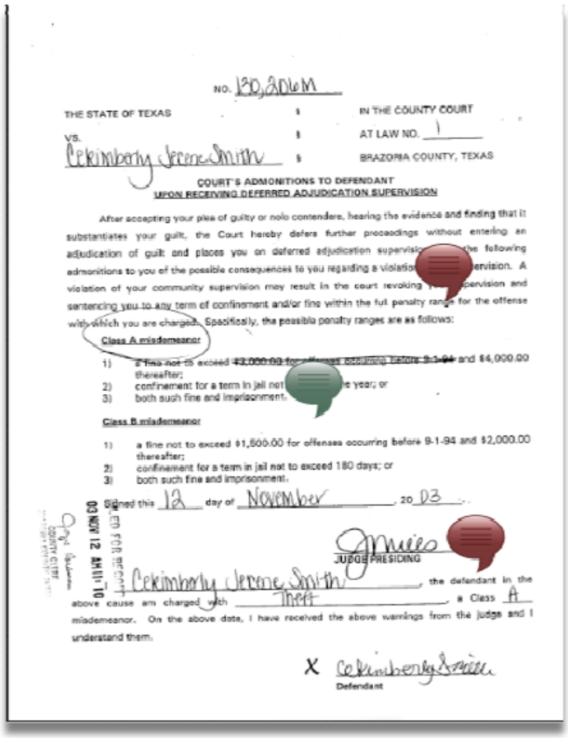
2. Tap the **Edit** button or tap the marker to close it.

3. Add, edit, or remove text.

4. Tap **Save Note**.

Marking a Page Note as Important

When adding or editing a page note, select **Important** on the notepad. This setting inserts a red page note marker.



NO. 130,206M

THE STATE OF TEXAS § IN THE COUNTY COURT

VS. § AT LAW NO. 1

Cekimberly Jerene Smith § BRAZORIA COUNTY, TEXAS

COURT'S ADMONITIONS TO DEFENDANT
UPON RECEIVING DEFERRED ADJUDICATION SUPERVISION

After accepting your plea of guilty or nolo contendere, hearing the evidence and finding that it substantiates your guilt, the Court hereby defers further proceedings without entering an adjudication of guilt and places you on deferred adjudication supervisio... the following admonitions to you of the possible consequences to you regarding a violatio... ervision. A violation of your community supervision may result in the court revoking ... pervision and sentencing you to any term of confinement and/or fine within the full penalty range for the offense with which you are charged. Specifically, the possible penalty ranges are as follows:

Class A misdemeanor

1) a fine not to exceed ~~$3,000.00 for offenses occurring before 9-1-94~~ and $4,000.00 thereafter;
2) confinement for a term in jail not ... e year; or
3) both such fine and imprisonment.

Class B misdemeanor

1) a fine not to exceed $1,500.00 for offenses occurring before 9-1-94 and $2,000.00 thereafter;
2) confinement for a term in jail not to exceed 180 days; or
3) both such fine and imprisonment.

Signed this 12 day of November, 20 03.

JUDGE PRESIDING

03 NOV 12 AM 11:10

Cekimberly Jerene Smith, the defendant in the above cause am charged with Theft, a Class A misdemeanor. On the above date, I have received the above warnings from the judge and I understand them.

X Cekimberly Smith
Defendant

Figure 37 – Page Note Set as Important

Deleting a Page Note

Deleting a page note uses the same rules followed to delete a case note.

Start and End a Court Session

Use the appropriate method to open a case, and then refer to the appropriate topics for the facts and instructions for working specific tasks on a case.

Starting a Court Session

On the **Case Nav** pane, the **Start Court** button works in conjunction with the **Ready** folder. Tapping **Start Court** opens the next case in the order that cases were placed in the **Ready** folder.

To start a court session:

1. Tap 

opens the next case in the **Ready** folder.

2. Work the open case as needed.

3. Mark the open case complete by tapping 

, which moves the case into the **Complete** folder.

   The next case in the **Ready** folder opens automatically.

Opening a Case from the Action Menu

Access a case from the **Session Manager** list through **Case Control**.

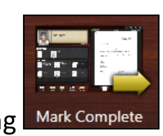
To open a case from the **Action** menu:

1. Tap **Case Control**  for the case.

2. Tap **View Case** on the 

Action menu.

3. Work the case as needed, such as inserting notes and moving it to another folder.

4. Mark the open case complete by tapping 

to move the case into the **Complete** folder.

5. Select the next case or folder to work.

Ending a Court Session

A court session can end at any time whether all of the scheduled cases have moved into the **Complete** folder or not. Cases can remain in folders waiting to be viewed and/or worked.

Returning to **Home View** (to the calendars) takes you out of the current session to where you can select another session.

Judge Edition Configuration

When you launch Judge Edition, you must enter your user name and password. Rights to access Judge Edition are on the Case Manager role of the Case Manager user access record. The right is called “Access Judge Edition.”

Judge Edition prompts for resource configuration. Configure the judge, magistrate, or location setup on the calendar sessions being downloaded into Judge Edition. If your location was restored during an installation, no prompt is issued. You are now ready to begin using Odyssey SessionWorks Judge Edition.

Access to Configuration

Access to the configuration settings is from the **Home View**.

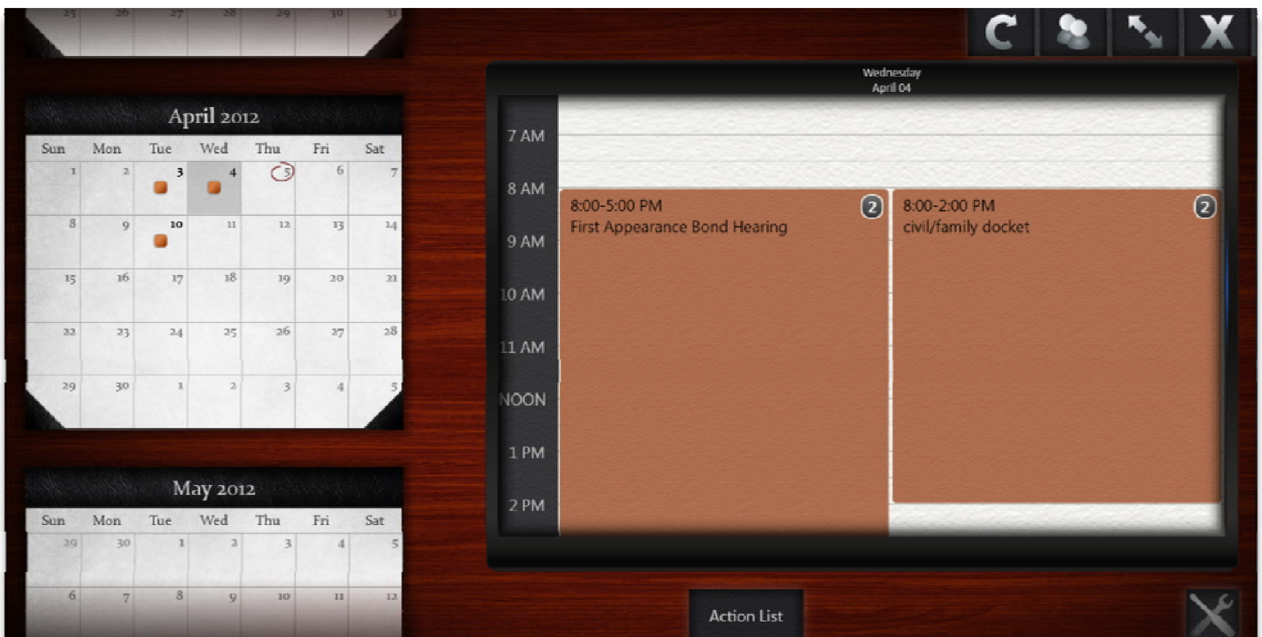


Figure 38 – Home View

To open the main configuration page, tap  in the lower right corner.

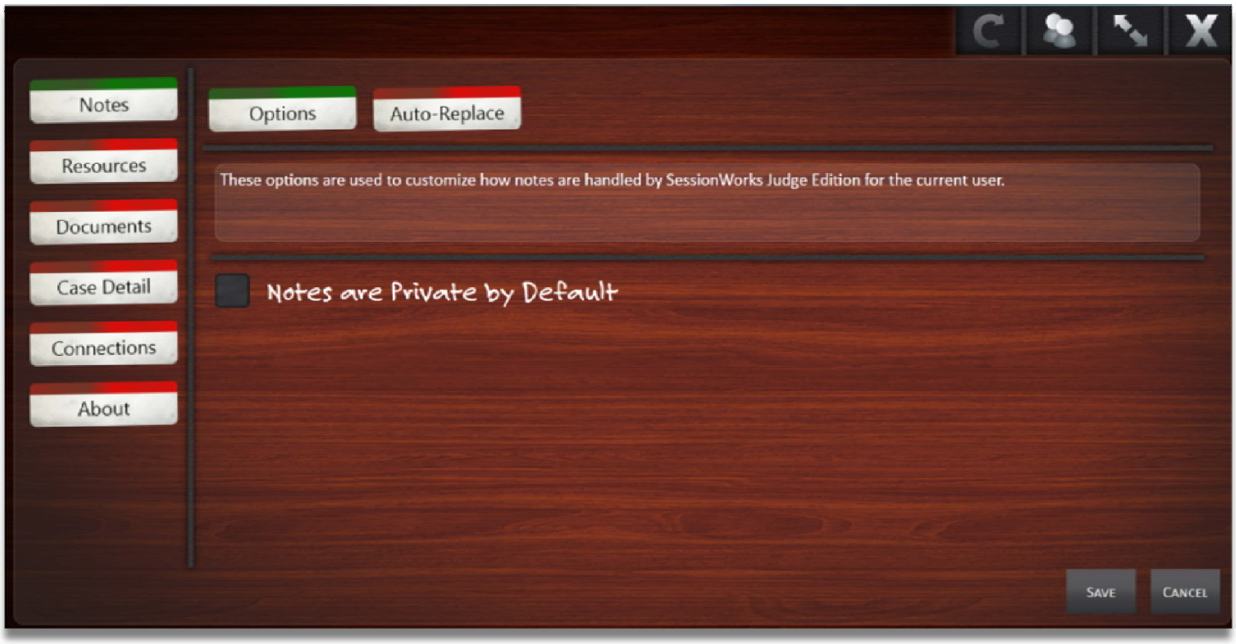


Figure 39 – Configuration Page

Notes

You have the option to set the note default to open as a private note type. Even if the notepad opens set for a Private note, you can clear this default setting.

Options

To have **Private** selected on the notepad when it opens, select the **Notes are Private by Default** check box.

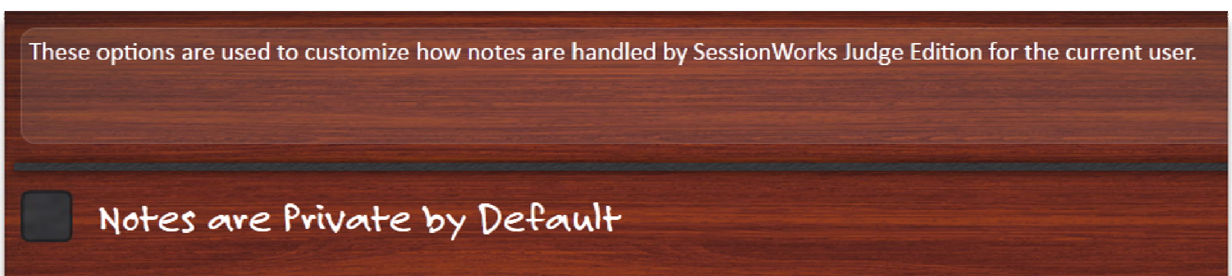


Figure 40 – Notes Set as Private by Default Dialog Box

To remove the private setting, clear this check box.

Defining Replacement Text for Shorthand Codes Used in Notes

To speed up the entry of information on your notes, you can define a shorthand code (comprised of characters) that expands when you tap any of these expansion keys—spacebar, semicolon, period, comma, Tab, question mark, backslash, or Enter.

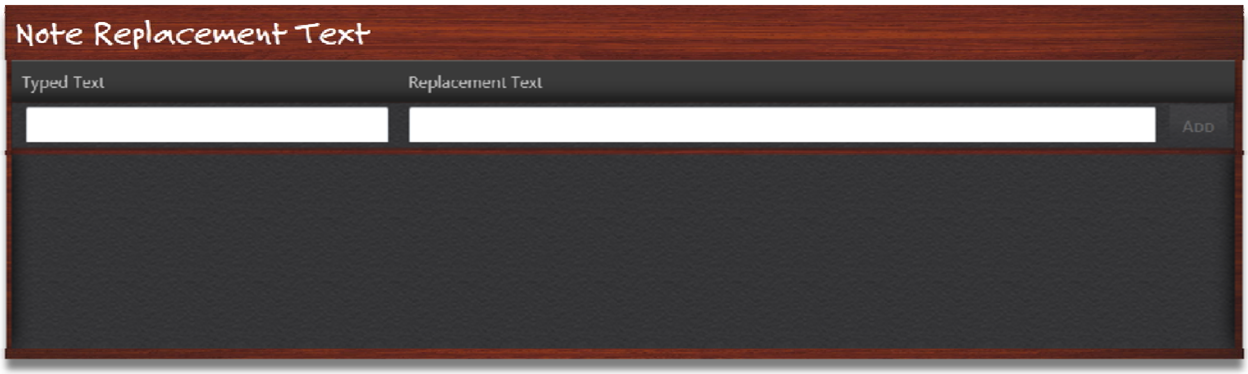


Figure 41 – Note Replacement Text Dialog Box

To define a shorthand code with its replacement text:

1. Click the **Auto-Replace** tab to open the **Note Replacement Text** page.
2. Type the representative characters in the text box **Typed Text**.
3. Type the actual text to insert on the note in the text box **Replacement Text**.

   For example, text typed as **DCNA** expands to “Defendant called in hall, no answer.”
4. Tap any one of the expansion keys.
5. Tap **Add** button.
6. Tap **Save** button.

Documents

On the **Documents** tab, the **Document Type Code Definitions** option enables you to set frequently viewed documents for automatic inclusion into the **Favorites** section of the **Table of Contents** in **Case View**.

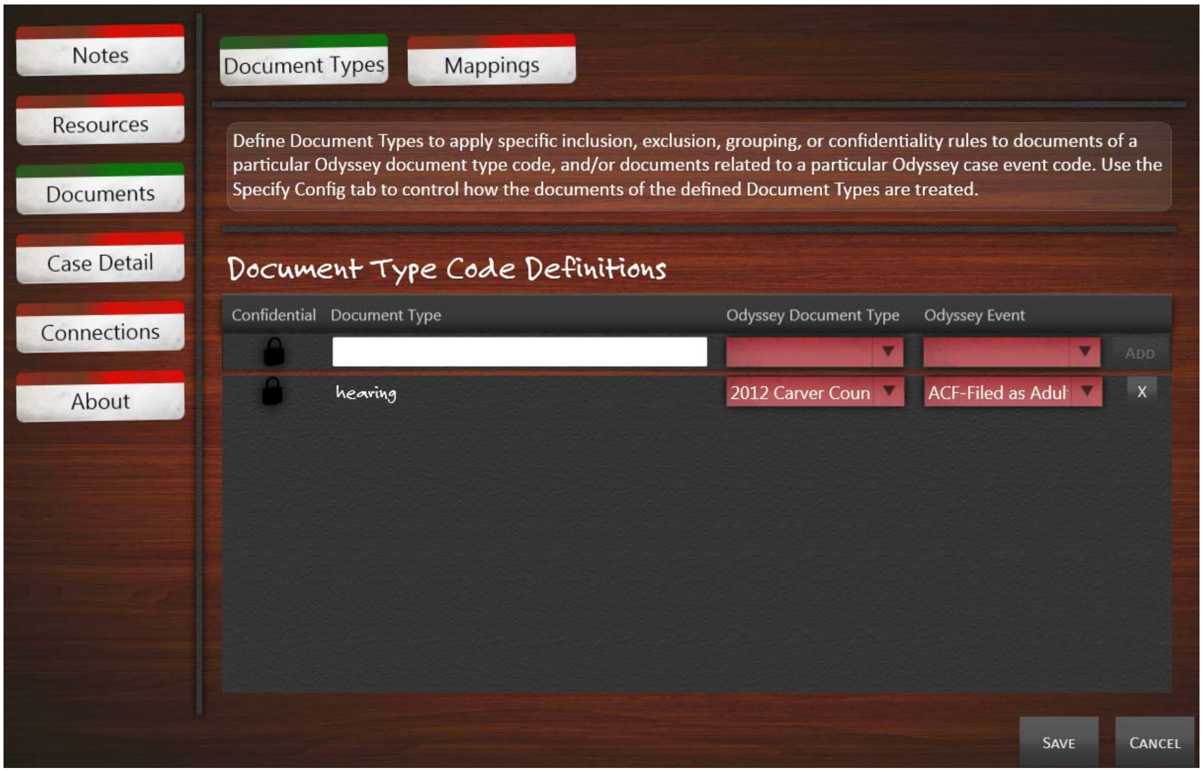


Figure 43 – Documents Label

Defining a Favorite

Define a document as a favorite by first assigning it a type name, such as Original Divorce Decree. Next, set the option—Odyssey document type or Odyssey event related— that triggers the display of this favorite.

To define a favorite:

1. In the **Document Type** text box, type a name to serve as the document type.

2. Set the triggering option for this document type:

    - Select the appropriate entry from the **Odyssey Document Type** drop-down list.
    - Select the appropriate entry from the **Odyssey Event** drop-down list.

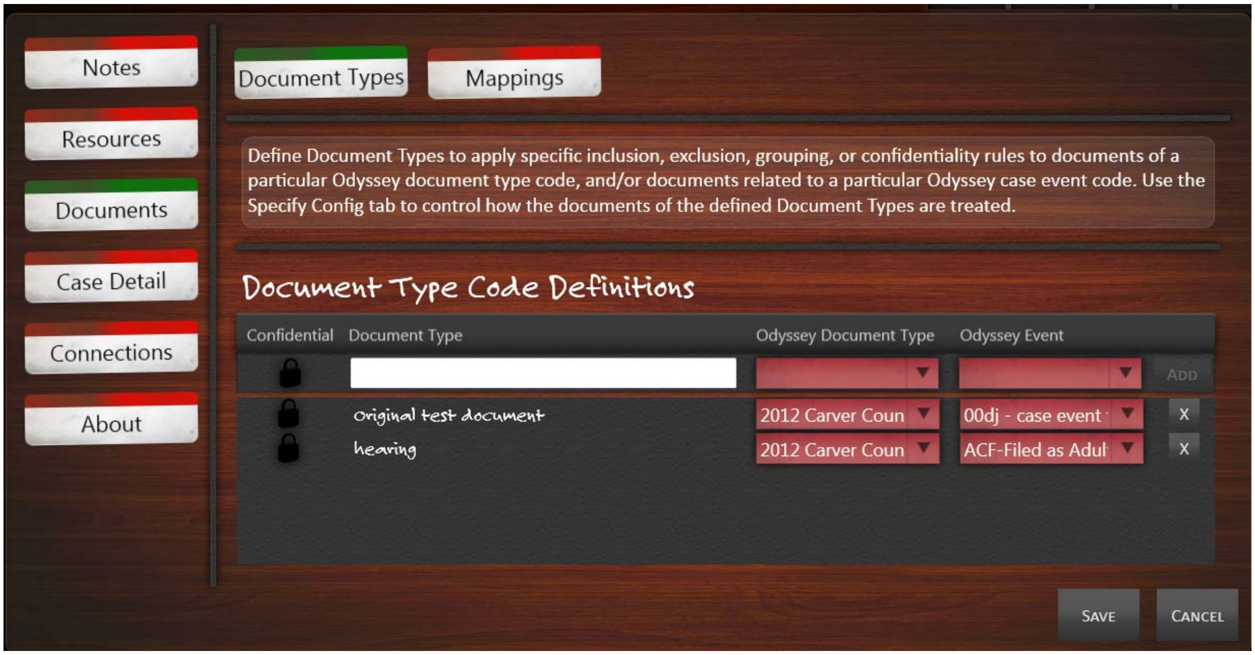


Figure 44 – Documents Label, Document Types

3. Tap the **Add** button.

4. Tap the **Save** button.

Mapping Document Types to Case or Hearing Types

To map the document types to the case types or hearing types for which they are to server as favorites:

1. Select the **Mappings** label on the top of the configuration screen.

   For example, the divorce decree would be a favorite on all divorce or custody case types. And citation could be a favorite for all traffic case types.

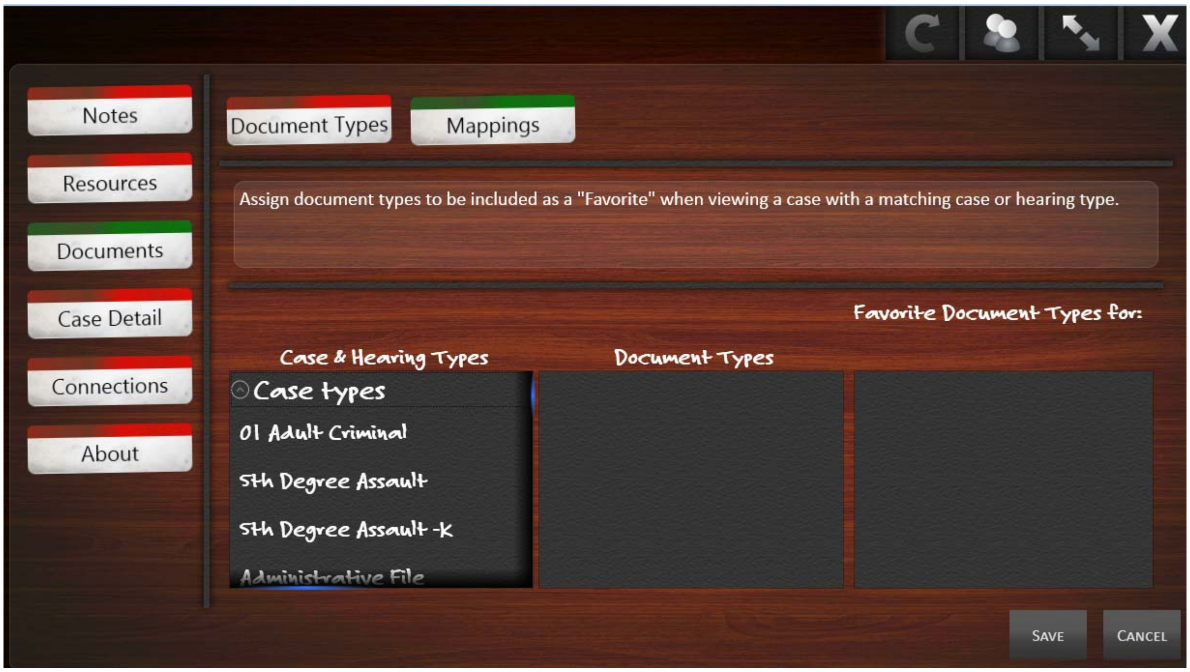


Figure 45 – Documents Label, Mappings Label

2. Select the case type on the **Case & Hearing Types** column.

   The document types configured earlier list in the center **Document Types** column.

3. Move the document type you want used for the divorce case type into the **Favorites Document Types for** column.

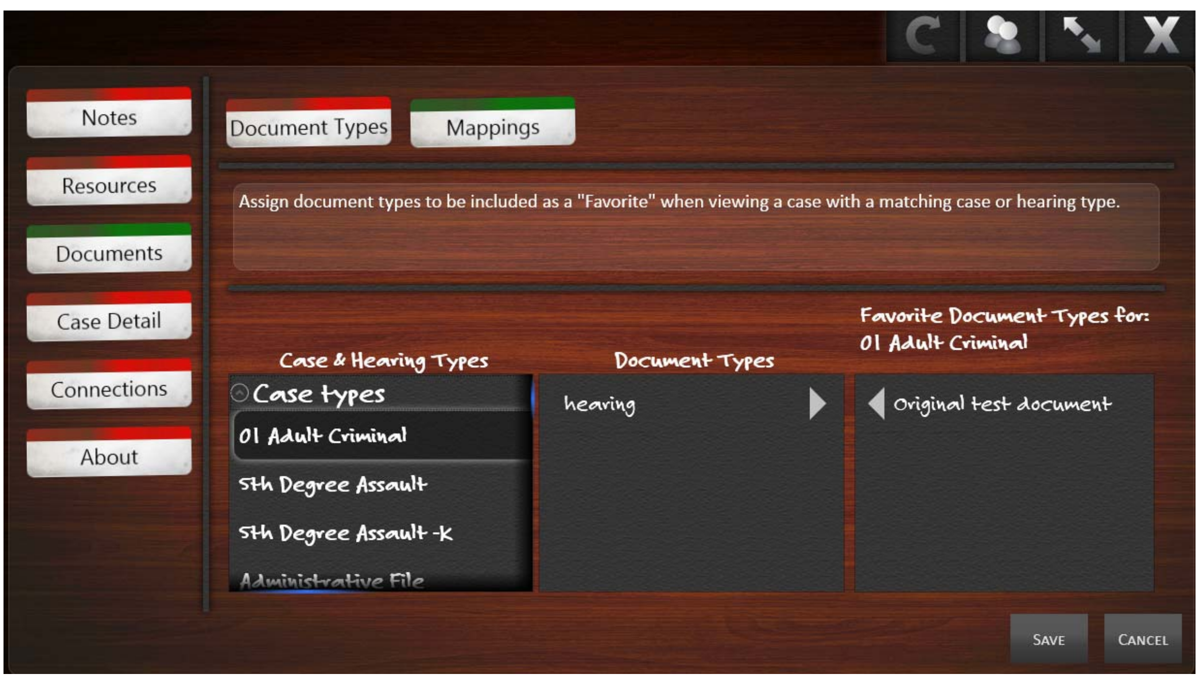


Figure 46 – Documents Label, Document Type and Case Type Configuration

4. Tap **Save**, and restart the Judge Edition application.

   Once the document configuration refreshes, the configured documents display as favorites in the **TOC** for the **Case View**.

Case Detail

Case Detail enables you to select the information to appear on **Case View** in the **Case Details** pane. For the case categories – criminal, civil, family, and probate – set options by case category. Where available, you can further set options by case category or base case type.

Figure 47 – Case Detail Label

If no settings exist, SessionWorks retrieves all information by default.

Connections

See your administrator for details.

About

Read about this application and the team that developed it.

Navigation Controls

SessionWorks Judge Edition provides an intuitive user interface that supports both touch gestures and keyboard navigation controls that enable you to navigate smoothly through your daily tasks.

Scroll Bar Navigation

Scroll bars allow you to easily navigate through views using the mouse. The figure shown shows the scroll bar in the Session Manager; however, it can also be accessed in the Home View, Table of Contents, and Document Viewer. Pause over the blue line on the edge of the page and the scroll bar will display.

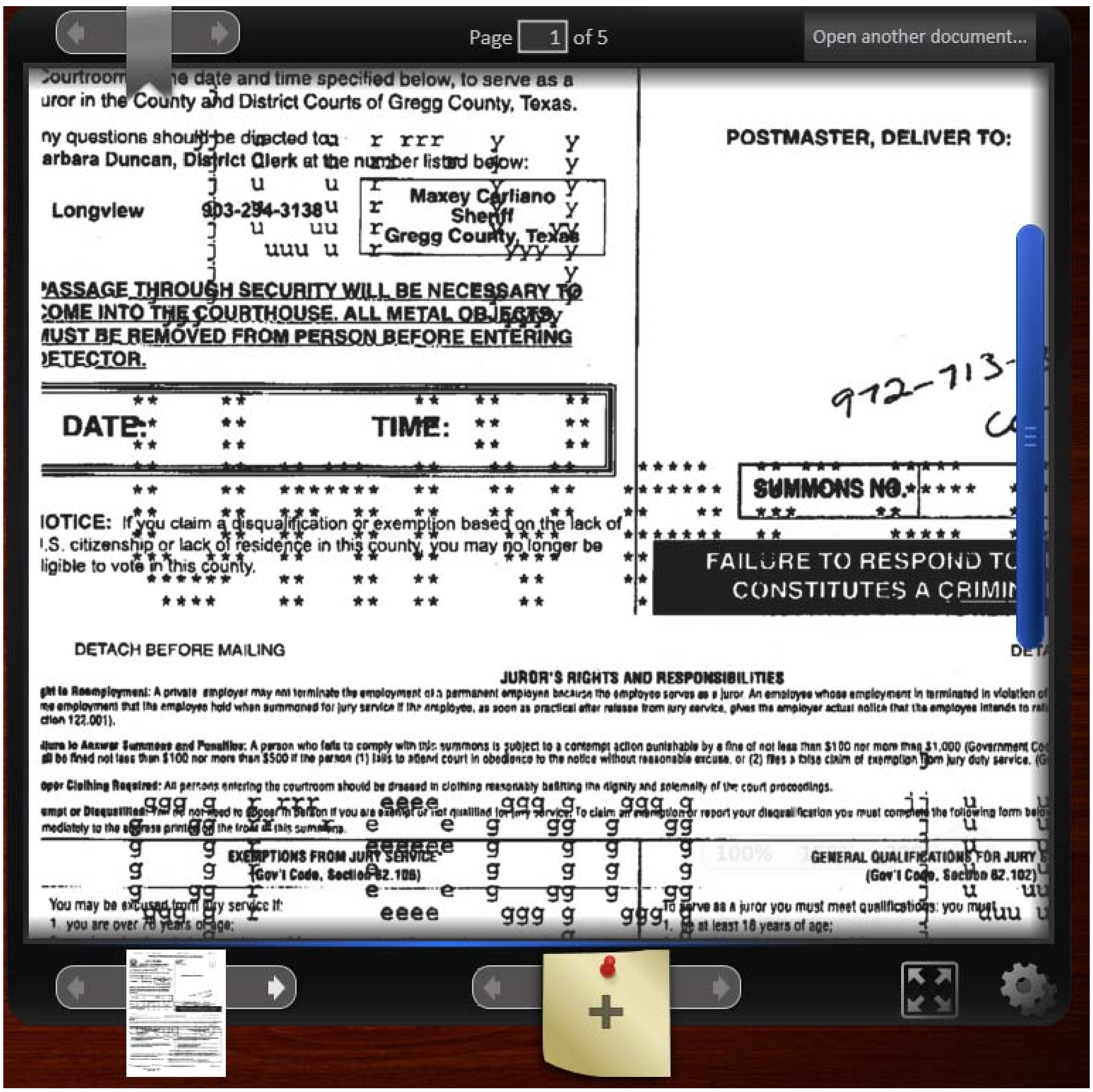
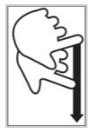
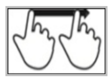
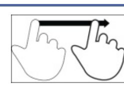


Figure 48 – Scroll Bars

Touch Gestures

Table 8 – Touch Gestures

Activity	Gesture	Action
Select		Tap
List Scroll		Flick
		Brush surface with fingertip
Page Scroll		Vertical
		Horizontal
Move Object		Drag
Zoom In/Out		Pinch/Spread

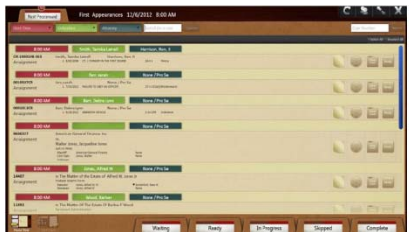
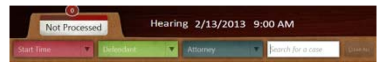
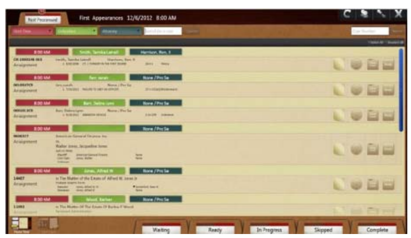
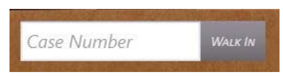
Keyboard Controls

Table 9 – Activities from the Keyboard

Activity	Keyboard
Add Case Note	F2
Previous page	Left arrow / Page Up
Next page	Right arrow / Page Up
Last page	End
First page	Start
Full-screen toggle	F11
Session Manager Focus on Find field	Ctrl + F

Find a Case Navigation

Table 10 – Case Search Activities

Activity	Location	Action
Navigate Cases		
Search for a Case	**Session Manager** page 	Provide the case detail text as criteria to locate a case, using either method:  1. From drop-down lists, select appropriate **values** for filtering cases during search. 2. Type **text** in search field to match against case contents.
Retrieve a non-scheduled case	**Session Manager** page 	Provide the number of the case to retrieve from Odyssey. 1. Type the Odyssey **Case Number**.  2. Tap ***WALK IN***. If found, an entry for that case number appears in **Session Manager** list of cases.

Session Manager Filters

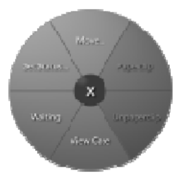
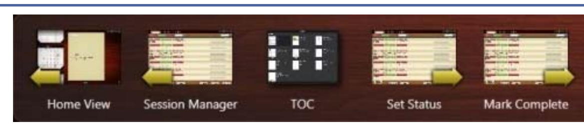
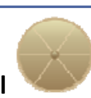
If setting a value in one of the filters affects another filter, the affected filters will update according to the first filter set. For example, the defendant James Smith is connected with the attorney Ron Harrison. When Ron Harrison is selected from the attorney filter, the defendant filter will only include James Smith. A 'bread crumb' will be left in the pane below the filters for visibility into what has been selected. This works in whatever direction specified. If the defendant filter was selected first, the time and attorney options would also be filtered down accordingly.

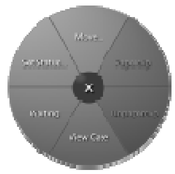
Figure 49 – Filter Functionality

Figure 50 – Filter Bread Crumbs

Case Activities Navigation

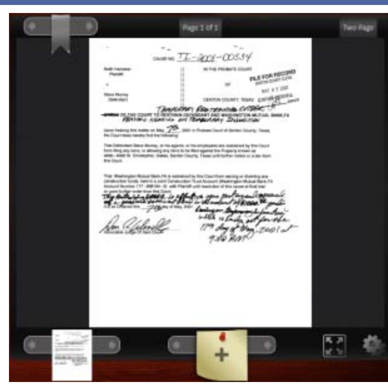
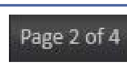
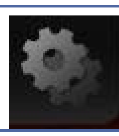
Table 11 – Case Activities

Activity	Option	Action
Case Control	**Case Control** 	1. Tap the **Case Control** to open the **Action** menu.  2. Tap on the **Action** menu the appropriate area for the desired action.
Move case position within a folder	**Action** menu 	1. Tap **Move** on the **Action** menu.  2. Tap the section labeled with desired direction.
Place case into another folder	**Action** menu 	1. Tap **Set Status** on the **Action** menu.  2. Tap the destination folder.
Navigate cases in a session	**Case Nav** pane **Set Status** button	 1. Tap **Set Status**.  2. Tap the button of the destination folder.
Action on a case	**Action** menu 	1. Tap **Case Control**  to open the **Action** menu. 2. Tap the action to apply. 3. Tap **X** to close the menu.

Activity	Option	Action
Group selected cases	**Action** menu 	1. Tap each individual case to select and highlight. 2. Tap the **Case Control** of one of the selected cases. 3. Tap **Paperclip** on the **Action** menu. 
Ungroup cases	**Action** menu 	1. Tap the group to highlight it. 2. Tap **Case Control**  to open the **Action** menu. 3. Tap **Unpaperclip**.

Document and Page Controls

Table 12 – Document and Page Activities

Activity	Action	
Document Viewer		
Go to Page		1. Tap  to open the **Go to Page** pad.  2. Tap the number of the page to view. 3. Tap **Enter**.
Gear		1. Tap to open the Document Viewer controls. 2. Tap again to close the controls.

Activity		Action
		Move the slider first to zoom, and then tap the pan arrows. • Pan control works on a zoomed document moving the document in the direction of tapped arrow. • Slide zooms in and out. •Circular arrow rotates the document clockwise.
Full Screen		Places document in separate screen with Document Viewer Controls.

Notes Shortcuts

Table 13 – Note Activities

Activity	Action
Add Case Note	F2
Add Page Note: Displayed page or left pane	F3
Add Page Note: Two Page Case View	Left pane – F3 Right pane – Shift + F3
Add Document Note	Open or left pane – F4 Right pane – Shift + F4